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ABSTRACT

This report covers the results of the fiscal year 1996 (October 1, 1995 through September 30, 1996) CPB (Corporation for Public Broadcasting) Public Television Programming Survey. This biennial survey, conducted since 1974, categorizes and analyzes trends in public television programming. Program carriage information was provided by TV Data via PBS Research; a random sample of 14 broadcast days was selected from each station. The following findings are highlighted: stations add to airtime; information and skills and general children's programming dominate airtime; "Sesame Street" retains the most broadcast hours; public television stations are the largest producing group; PBS distributes about two-thirds of programming hours; WGBH and WNET present nearly one-third of PBS programs; pledge programming accounts for over one-tenth of airtime; and local programming continues to have a presence in schedules. Tables and graphs are included which show: subject matter percentages based on airtime; the top 10 programs based on broadcast hours; producer percentages based on airtime; pledge as a percentage of airtime by license type; local programming subject matter percentages based on airtime; licensee characteristics; and public television programming historical trends from 1974-1996. (AEF)

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Research Notes

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Highlights of the PUBLIC TELEVISION PROGRAMMING SURVEY FISCAL YEAR 1996

This report covers the results of the FY96 CPB Public Television Programming Survey. This biennial survey, conducted since 1974, categorizes and trends public television's programming. The survey period for FY96 covered October 1, 1995 through September 30, 1996. For more detailed information or long-term trends, please see the tables attached at the end of this narrative.

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Stations Add to Airtime

On average, CPB-funded stations broadcast 6,758 hours in FY96, representing a 4 percent increase over FY94 results (the previous time this survey was conducted). Stations averaged 18.6 broadcast hours per day, with nearly three-quarters of the stations being on the air between 17 and 20 hours per day. Nine stations were on the air for 24 hours per day.

The most popular sign-on times were 5:00 a.m. (28.9 percent of the stations) and 6:00 a.m. (23.5 percent). Sign-off times were much more dispersed, but 61.0 percent of the stations had signed off by 2:00 a.m.

Information and Skills, General Children's Programming Dominate

Information/skills and children's programming controlled the airtime, representing over one-quarter of the broadcast hours each. News/public affairs and cultural programming each accounted for between 17 percent to 20 percent of the time. The last category, Instructional Television (ITV), represented less than one-tenth of the broadcast hours. More specifically:

- Information and skills programming, which covers content such as how-tos, science, and nature, increased slightly in FY96 to 28.5 percent of the airtime.

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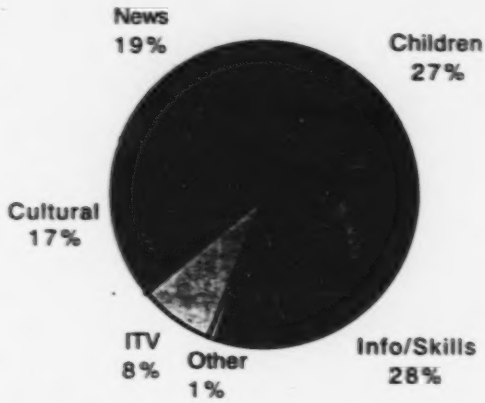
- General children's and youth programming was another 27.2 percent of broadcast hours—a slight drop from FY94, but one almost entirely due to a loss in *Sesame Street* telecasts. In FY94, *Sesame Street* comprised 9.2 percent of PTV airtime, but in FY96 the same figure had fallen to 7.7 percent.

- News and public affairs programming took up 19.3 percent of the airtime. That figure matches the 1993-94 results—a growth year due to the addition of *Charlie Rose*.

Subject Matter Percentages Based on Airtime



- Cultural programming (*e.g.*, film, dance, drama, and music) came in at approximately the same rate as in FY94 with 16.6 percent of the airtime.

- ITV comprised 7.9 percent of the airtime, slipping one point from the 1993-94 survey. The drop originated in the elementary and secondary ITV category. Post-secondary ITV airtime held up compared to FY94.

Sesame Street Retains Top Spot

Sesame Street accumulated the most broadcast hours of any public television title in FY96. Its 7.7 percent of broadcast hours nearly doubled the percentage for the next closest title, *MacNeil/Lehrer Newshour* (4.4 percent). Third place on the list went to *Barney & Friends* with 3.5 percent of the airtime.

Top-Ten Carried Programs Based on Broadcast Hours
Percent of Number of Broadcast Hours and Number of Programs

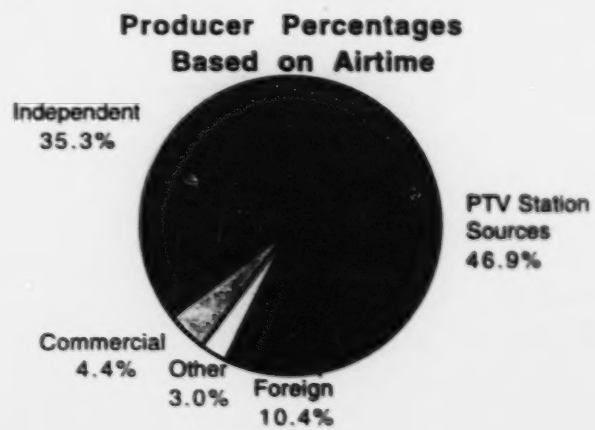
		Number of Broadcast Hours	Number of Programs
1.	Sesame Street	7.7%	4.8%
2.	MacNeil/Lehrer	4.0	2.5
3.	Barney & Friends	3.5	4.3
4.	Charlie Rose	2.3	1.4
5.	Mister Rogers	2.0	2.5
6.	Wishbone	2.0	2.4
7.	Reading Rainbow	1.8	2.2
8.	Puzzle Place	1.7	2.1
9.	Lamb Chop	1.7	2.1
10.	Nightly Business Report	1.6	2.0

All the top ten titles were Monday-Friday strips of the news/public affairs or children's genres. While most programs in the top ten were half-hours, the top two titles were hour-long strips that receive daily repeats on many stations.

Public Television Stations the Largest Producing Group

Public television (PTV) stations produced just under one-half (46.9 percent) of its own airtime–the largest percentage of any producer category. The 46.9 percent figure includes local programming (4.9 percent), single PTV station producers (36.0 percent), and PTV co-productions (6.0 percent). Overall, PTV station productions showed an increase over the FY94 figure of 43.2 percent. WGBH (Boston) produced 8.4 percent of the broadcast hours in FY96 and 5.7 percent came from WNET (New York).

Independent producers accounted for another 35.3 percent of the airtime, with 8.7 percent of that coming from CTW. Foreign producers were 10.4 percent and commercial producers 4.4 percent of the airtime.



PBS Distributes About Two-Thirds of Programming

Public Broadcasting Service distributed 63.0 percent of the programming broadcast hours in FY96—a figure that has remained steady over the last six surveys.

The next closest competitor to PBS was the American Program Service (formerly the Eastern Educational Network) with 13.1 percent of the airtime. Other regional networks represented 11.5 percent of time. Coinciding with PBS's steady dominance, regional network percentages have been at the same level since the FY90 survey.

WGBH and WNET Present Nearly One-Third of PBS Programs

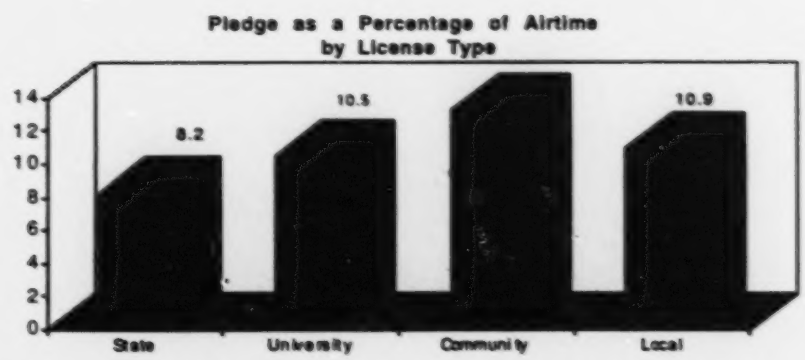
Together the big two PTV station producers presented 30.4 percent of PBS programs in FY96—a figure which has remained fairly constant over the last six surveys. WGBH presented 16.2 percent of the program hours and WNET presented 14.2 percent.

Another third of the program hours (33.4 percent) was presented by remaining stations in the system. Co-presentations accounted for 13.0 percent of airtime, CTW presented 13.8 percent and non-PTV presenters were 9.3 percent.

Pledge Programming Accounts for Over One-Tenth of Airtime

Stations indicated that 11.7 percent of their FY96 airtime was devoted to pledge–a slight increase over the 11.2 percent found in FY94. Pledge represented 43 broadcast days per year for the average station or about six weeks total time.

The type of licensee was a large factor influencing the amount of pledge airtime. Community licensees relied on pledge the most with 13.2 percent of their time devoted to pledge. State licensees reaped the benefit of consistent funding and pledged the least with only 8.2 percent of their time going to pledge. University and Community licensees fell in the 10-11 percent area.



The northeast and western regions of the country were more likely to see pledge days as the percentage of time increased to 13.1 and 13.0 percent, respectively. In the central region, pledge only amounted to 9.9 percent of the broadcast hours.

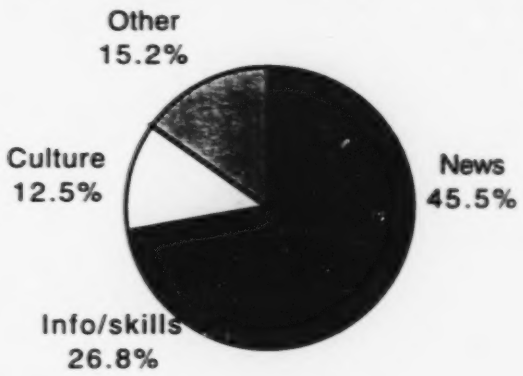
Two program types showed much more prevalence during pledge: 22.8 percent of music and dance performance and 32.6 percent of self-help programming airtime came on a pledge day compared to 11.7 percent for the average program type.

Local Programming

While it represented only 4.9 percent of the airtime, local programming continues to have a presence in the schedules. By far, the largest portion of local programming is news and public affairs (45.5 percent) and most of this, about 75 percent, is newscast-style talk programming rather than live events or documentaries.

Information and skills programming, which includes how-tos, outdoor programs, and exercise programming, constituted 26.8 percent of time. Cultural/performance programming was 12.5 percent, and 15.2 percent of the time fell into miscellaneous other categories.

Local Programming Subject Matter Percentages Based on Airtime



In terms of station characteristics, local and school system licensees were much more likely to air local programming. Among those types of licensees, 13.2 percent of airtime was local programming. Surprisingly, state and university licensees were not any more likely to run local programming than was the average station.

Budget size also influenced the amount of time for this kind of programming. The cut off came at the $3 million annual budget mark. Those stations budgeting less than that per year gave 3.9 percent of their airtime to local programming, while those with larger budgets allotted 5.3 percent.

System Statistics

In the 1995-96 season, there were 201 public television CPB grantees accounting for 352 stations across the country. (One hundred eighty-seven broadcasters are included in the survey results.)

Licensee characteristics were as follows:

- By region of the country, 19.1 percent of the licensees were in the Northeast, 29.4 percent in the South, 29.4 percent in the Central, and 21.9 percent in the West.

- A large majority of licensees—70.4 percent—serve less than a million homes. Another 17.1 percent serve between one and two million homes and 12.3 percent serve more than 2 million homes.

- State systems accounted for 12.8 percent of the licensees, university licensees were another 31.5 percent, community licensees made up 51.3 percent and local or school district licensees were 4.3 percent.

- Approximately 20 percent of the licensees fell in each of the following annual budget categories: less than $2 million (20.3 percent), $2 million up to $3 million (18.7 percent), $3 million up to $5 million (20.9 percent), $5 million up to $9 million (18.2 percent), and $9 million plus (21.9 percent).

Methodology

Program carriage information was provided by TV Data via PBS Research. A random sample of 14 broadcast days was selected from each station. Stations were surveyed via mail to verify their schedules, and obtain any missing information, their pledge dates, and local program classifications. Follow-up phone calls were made to collect information from those not responding. The non-local programming was coded according to information provided by CPB, PBS and regional distributors. CPB provided data for station classifications.

If you have questions about these data, please refer them to Young Lee (202) 879-9674, or e-mail to ylee@cpb.org. We also welcome any comments and recommendations on how to make the data more useful to you.

Table 1
Public Television Programming, 1974-1996 [1]
Historical Trends -- Part I

	1974	1976	1978	1980	1982	1984	1986	1988	1990	1992	1994	1996
System Characteristics												
Number of Television Stations	238	253	272	281	291	303	305	322	341	349	349	352
Number of Broadcasters	151	152	156	160	164	169	178	186	193	198	198	201
Broadcasters in the Survey[2]	151	152	156	160	164	169	178	169	176	178	181	187
Broadcast Hours/Number of Programs												
Average Annual Hours per Broadcaster	3,872	4,542	4,894	5,128	5,421	5,542	5,650	6,135	6,392	6,303	6,500	6,758
Average Annual Number of Programs per Broadcaster	6,547	7,607	8,282	8,823	9,162	8,978	9,327	10,127	10,319	9,862	10,379	10,595
Percentages of Broadcast Hours												
Program Content												
General	82.7	84.3	86.8	86.8	86.6	87.9	85.9	84.6	86.3	89.8	91.6	92.2
News and Public Affairs[3]	12.6	11.9	11.0	12.2	12.4	14.1	16.4	16.3	17.6	17.4	19.2	19.3
Information and Skills	15.9	19.9	23.6	22.8	24.5	25.5	29.5	31.7	31.5	28.7	26.8	28.5
Cultural	17.9	20.9	22.1	21.9	22.6	20.1	20.5	17.9	19.1	17.5	16.0	16.6
General Children's & Youth[4]	10.7	10.0	8.7	8.9	7.5	7.9	6.5	5.8	6.0	14.6	19.8	19.5
Sesame Street	21.2	17.8	16.1	15.5	14.8	14.8	11.4	11.7	11.2	11.0	9.2	7.7
Other General	4.4	3.8	5.3	5.5	4.8	5.5	1.6	1.2	0.9	0.6	0.6	0.6
Instructional[5]	17.1	16.6	14.9	14.7	14.3	13.0	14.5	15.5	13.7	11.6	8.9	7.9
Children & Youth	15.2	15.2	13.7	13.7	12.9	12.4	–	–	–	8.7	5.8	4.8
Adult	1.9	1.4	1.2	1.0	1.4	0.6	–	–	–	2.9	3.1	3.1

Notes:
1. 1974 and 1976 are calendar years. 1978 to 1996 are October through September fiscal years.
2. In 1988, 1990, 1992, 1994 and 1996only broadcasters in the 50 US states were surveyed.
3. In 1986, 1988, 1990, 1992, 1994 and 1996 the News and Public Affairs category included "Business or Consumer".
4. General children and youth category does not include Sesame Street since this is reported separately.
5. After 1974, some general audience programs with instructional applications were double counted if aired during school hours when school in session. The Electric Company was one such program when it ran on Public Television. Columns may total to more than 100% due to the double counting.

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Table 1
Public Television Programming, 1974-1996 [1]
Historical Trends -- Part II

System Characteristics	1974	1976	1978	1980	1982	1984	1986	1988	1990	1992	1994	1996
Number of Television Stations	238	253	272	281	291	303	305	322	341	349	349	352
Number of Broadcasters	151	152	156	160	164	169	178	186	193	198	198	201
Broadcasters in the Survey[2]	151	152	156	160	164	169	178	169	176	178	181	187
Broadcast Hours/Number of Programs												
Average Annual Hours per Broadcaster	3,872	4,542	4,894	5,128	5,421	5,542	5,650	6,135	6,392	6,303	6,500	6,758
Average Annual Number of Programs per Broadcaster	6,547	7,607	8,282	8,823	9,162	8,978	9,327	10,127	10,319	9,862	10,379	10,595
Percentages of Broadcast Hours												
Producer[3]												
Local (Broadcaster's Facilities)	11.4	10.1	7.7	7.0	6.7	5.7	5.2	5.2	4.6	4.1	4.6	4.9
Any PTV Source	45.4	48.2	52.2	46.2	45.6	44.4	37.6	27.1	32.0	31.0	32.8	36.0
Consortium/Co-Production[4]	2.5	1.7	1.8	2.7	2.6	3.3	3.1	9.8	9.7	6.2	5.8	6.0
Children's TV Workshop	22.0	18.8	16.8	17.1	15.8	16.4		16.1	15.2	14.1	12.1	8.7
Independent and CTW							<29.1>					
Independent Producer	5.9	6.1	5.3	7.9	11.3	9.2		19.4	18.7	25.2	25.9	26.6
Foreign Producer				7.8	6.0	8.9	11.0	8.7	7.7	10.7	10.0	9.8
Any Foreign Participation	5.8	7.6	9.1									
International Coproduction				4.7	4.1	4.3	4.1	5.3	4.6	0.7	0.4	0.6
Commercial Producer	1.9	2.8	2.7	3.2	3.9	2.8		4.4	4.3	4.6	5.5	4.4
Commercial and Non-PTV ITV Producers							5.5					
Non-PTV ITV Producer								4.0	3.1	2.9	3.2	3.1
Other	5.1	4.6	4.4	3.5	4.0	4.6	4.4	0.1	0.2	0.6	0.6	0.5
Distributor												
Local Distribution Only	11.3	10.0	7.4	6.8	6.2	5.6	4.9	6.4	5.7	4.9	4.4	4.5
Public Broadcasting Service	62.1	69.3	71.6	69.6	67.1	65.3	63.9	62.0	59.4	62.7	63.1	63.0
Regional PTV Network	9.6	6.2	5.4	7.6	10.8	13.0	14.0	17.8	23.8	23.1	23.3	24.6
Other	17.0	14.5	15.6	16.0	15.9	16.1	17.2	13.8	11.1	9.3	9.2	7.9
Presenter[5]												
Non-PBS Programs (No Presenter)										37.3	37.3	37.5
PBS Programs										62.7	62.7	62.7
WNET or WGBH										18.8	18.0	19.0
Single Presenter, Another Licensee										12.2	17.4	20.9
Co-Presentation of PTV Licensees										9.2	8.2	8.1
CTW										14.2	12.0	8.7
Non-PTV Presenters										7.1	6.9	5.8
Other										1.2	0.2	0.2

Notes:
1. 1974 and 1976 are calendar years. 1978 to 1996 are October through September fiscal years.
2. In 1988, 1990, 1992, 1994 and 1996 only broadcasters in the 50 US states were surveyed.
3. Producer definitions and categories were changed in 1984 and then again in 1992. The figures for those years compared to the previous years may vary simply due to the definitional changes.
4. In 1988 "U.S. Coproduction" replaced "Consortium".
5. Presenter information added in 1992. Previous years unavailable. The presenter is defined as the entity that negotiates program distribution agreements with PBS. It may or may not be the actual producer.

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